



Promoting the Participation of Indigenous Women in World Bank-funded Social Sector Projects: An Evaluation Study in Mexico

Trasparencia

Mexico has long been one of the World Bank's primary clients and is currently its largest cumulative borrower, with loan commitments of up to \$5.5 billion approved for 1997-99 (World Bank 1996). During the past 15 years, the focus of the Bank's lending program in Mexico has shifted away from structural adjustment towards poverty reduction, a strategy that emphasizes investment in health and education.

As elsewhere around the world, gender differences in these sectors in Mexico are prevalent with regard to access to and control over resources and decision-making. Given the multiple roles that women play in production, reproduction, child rearing, and household maintenance, social sector projects that target women generate economic and social benefits both for individuals and countries as a whole. Consequently, the Bank has increasingly funded projects that aim to strengthen the participation and position of women in development.

The Bank's publications, official policies, and project guidelines also acknowledge the importance and benefits of promoting women's roles and empowerment (Women's Eyes on the World Bank, U.S. 1997; World Bank 1994, 1995, 1997). However, little has been done to evaluate what resources and opportunities are needed to improve the actual standing and participation of women in both Bank-funded programs and society as a whole. While the Bank launched a Gender Action Plan for Central America and Mexico in 1996, this Plan does not clearly define gender impact and assumes that strategies aimed at communities will affect men and women in similar ways. Further, the Bank's effectiveness in applying its own guidelines on gender and community participation to policy, project design, and implementation on the ground has not been systematically assessed.

This report presents the findings from an evaluation study designed and conducted by Trasparencia ("Transparency"), a Mexican nongovernmental organization (NGO) founded in 1995 to analyze, monitor, and assess the World Bank's environmental and social sector portfolio with regard to gender impact and community participation. In addition, Trasparencia aims to foster the participation of Mexican civil society in the development process. To this end, the organization conducts research and advocacy work, translates relevant Bank documents into Spanish, and disseminates its findings to rural social organizations, NGOs, government agencies, and Bank officials.

Objectives

In 1996-1998, Trasparencia undertook an analysis of three Bank-funded education and health projects in the state of Oaxaca, where a high proportion of the population (39 percent) is indig-

enous and poverty, illiteracy, and mortality rates are among the highest in Mexico. The long-term goal of the evaluation project was to promote the participation of indigenous women in World Bank-funded

social sector development. Specific objectives were to:

- Analyze the ways in which Bank-financed projects in education and health do or do not promote

the participation of women in poor and indigenous communities;

- Develop and disseminate recommendations on the design and implementation of Bank projects, based on the evaluation study

and discussion of current practices with stakeholders;

- Contribute to greater awareness about the Bank's role in Mexico and the informed participation of civil society (particularly women's

organizations) in the design and implementation of the Bank's education and health-related projects.

The Evaluation

Trasparencia evaluated the Oaxaca sections of three Bank-funded basic education and health projects currently underway in Mexico: the Second Primary Education Project (PAREB), which aims to improve academic achievement and reduce grade repetition and dropout rates in primary schools; the Preschool Education Project (PRODEI), which prepares children for primary school by training their parents in child development practices; and the Second Basic Health Care Project (PAC), which aims to make quality, low-cost health care available to populations that lack such services.

Originally designed as a research project, Trasparencia's evaluation evolved implementation to include capacity building of local NGOs, dialogue among stakeholders, and the application of research data to promote the organization's advocacy activities. In addition, the organization used initial research findings to develop unprogrammed activities, such as an analysis of the policy context in which World Bank projects operate in Mexico and a seminar series for Oaxaca-based NGOs. The project was implemented in three phases.

Phase I: Analysis of Community Participation in Local Development

Between November 1996 and January 1997, 43 communities in Oaxaca were surveyed on participation in existing community-based

structures related to health and education.¹ The data gathered during this process helped to identify how education and health services are administered, the functions of local committees and their relation to the community, and the roles of relevant actors.

The survey data revealed that NGOs were unable to participate more actively in Bank-financed projects because of a lack of information on the World Bank and its operations in Mexico. This finding prompted Trasparencia to conduct seminars for Oaxacan NGOs working in education and health on Bank operations in Mexico's social sector. In addition, Phase I of the project included the collection and analysis of official documents on World Bank operations in Mexico.

Phase II: Analysis of Public Policy and Seminars for NGOs

The two aspects that evolved from data collection in Phase I—the lack of information on the World Bank provided to NGOs and the analysis of Bank documents—were incorporated into the second phase of the project. Between March and August 1997, Trasparencia conducted a systematic review of public policy and program documents in education and health at the state and federal levels, focusing on how the concepts of “community participation” and “gender perspective” were interpreted and addressed in official discourse.

In response to the need of NGOs to better understand World Bank operations in Mexico, Trasparencia launched a seminar series for Oaxacan organizations working on education, health, and gender issues in April 1997. Between April and September 1997, 12 sessions were held with academics and representatives from Oaxacan NGOs, state and federal governments, and the World Bank on topics such as internal planning and project evaluation, the goals of Bank-funded projects, rural development, and gender advocacy. In November 1997, a final seminar was held on the Bank-financed Sustainable Development project.

Phase III: Project Implementation, Dissemination, and Outreach

The policy analysis conducted in Phase II was complemented by information gathered on the ground operations of the three Bank-funded projects during Phase III. First, the official documents were reviewed using detailed criteria related to program design, evaluation, and operations. Findings from Phase I were then applied to determine how the Bank interprets gender perspective and community participation in its projects. (These criteria were also used, for the purpose of comparison, to evaluate education and health projects in Mexico not financed by the World Bank.)

The second part of Phase III involved fieldwork in two municipalities—San

¹ The original research design included a survey of approximately 20 municipalities within the state of Oaxaca. However, since analysis of the first round of data collected revealed little variation in structure and functions of community-based development committees, the project team concluded that the analysis and conclusions were unlikely to be affected by additional fieldwork and surveys of 12 municipalities were canceled.

Juan Guichicovi in the Istmo region and Eloxochitlán de Flores Magón in the Mazateca region. These municipalities were selected because of the strong interest of local NGOs in Traspencia's work, their previous experience with the implementation of the three projects under review, and their distinct ethnic, linguistic,

and cultural roots. The fieldwork analysis—carried out in collaboration with three NGOs²—focused on gathering information about the Bank's operations at the community level, using qualitative research methods (such as interviews and participatory appraisal techniques) with project agents, community

representatives, and beneficiaries. As in Phase I, data collection focused on community participation and gender impact. Findings were disseminated through written reports and in meetings with representatives from each sector or institution, including key Washington, D.C.-based World Bank staff.³

Results

Analysis of Education and Health Projects

The public policy analysis carried out by Traspencia and the Oaxacan NGOs resulted in a report, *Monitoring of Public Programs in Education and Health*. The report contained a comparative analysis of education and health projects targeted toward poor indigenous communities in the state of Oaxaca and elsewhere in Mexico and was disseminated to the World Bank, federal and state government officials, and NGOs in October 1997.

Expanded Project Reach

Following participation in the seminar series launched in Phase II, NGO representatives, World Bank staff, and federal and state government officials have continued to discuss issues related to the gender implications of social sector invest-

ment projects and other public policy initiatives. Follow-up sessions with seminar participants generated possible strategies to expand and disseminate information, including regular press briefings, articles, and other media-related activities. In addition, project reports have been disseminated among federal and state officials. As a result, the Oaxacan Ministry of Health convened a meeting to discuss the report and its recommendations. In the final three months of the project, Traspencia expanded its contacts and the reach of its findings by participating in several state and national conferences of women's networks.⁴

Conclusions

With regard to projects funded by the World Bank in Mexico, Traspencia found that they did

involve local institutions in administration and logistics. However, the projects overall fell well short of the Bank's own policies and norms, including operational directives on indigenous peoples, the gender dimensions of development, and the participation of NGOs.

In contrast to the three non-Bank funded projects studied, the Bank projects did not contain mechanisms that allow beneficiaries to participate constructively in project implementation or evaluation. In addition, none of the Bank projects were found to incorporate indicators for evaluation of community participation and gender impact, gather gender-disaggregated data, or produce mid-term evaluations and progress reports that address these aspects.⁵

Recommendations and Lessons Learned

Many communities in both Mexico and around the world are affected by World Bank projects, but are unable to conduct needs assessments, identify resources, and develop

solutions to problems. Steps that the Bank and other multilateral development agencies, working in collaboration with communities, can take to remedy this situation are as follows:

► Enhance local participation.

Since truly participatory projects require input from communities at all stages of project design and implementation, future World Bank

² The collaborating organizations were Centro de Estudios de la Mujer y la Familia (CEMYF) A.C.; the Comisión de Mujeres of the Unión de Comunidades Indígenas de la Zona Norte del Istmo (UCIZONI) A.C.; and the Grupo de Apoyo a la Educación de la Mujer (GAEM), A.C.

³ In an additional effort, the project team conducted outreach with a number of national networks involved in advocacy activities related to the International Conference on Population and Development (Cairo, 1994) and the Fourth International Women's Conference (Beijing, 1995).

⁴ These included the National Coordination of Women's NGOs for a Feminist Millennium, the National Forum on Women and Population Policies, the National Network of Rural Promoters and Advisors, and the State Assembly of Women.

⁵ Both PAREB and PRODEI use educational and training materials that promote nontraditional gender roles, while PRODEI involves an equal number of men and women in project management and coordination. PRODEI also provided opportunities for women's participation through training of community promoters and informational sessions with parents.

social sector projects should set aside time, money, and human resources for local capacity building. Project design and implementation should also relate more closely to the experiences and conditions of communities. Project beneficiaries or their representatives should develop the capacity necessary to enter as equal partners into a dialogue with the Bank and to monitor and evaluate the design and implementation of Bank-financed projects.

► **Support women's initiatives.** A development process that is truly participatory, built from the bottom up, should create and strengthen opportunities for both men and women to discuss issues that concern them. In every aspect of its work, the Bank should avoid viewing women primarily as mothers and caretakers and instead work to recognize their role in development. The Bank should also support mechanisms through which women can come together to assess their needs, discuss and analyze their problems, and devise solutions.

► **Disseminate information.** The World Bank and other funders of development projects should help grassroots organizations develop the capacity to document and analyze their own experiences with public development programs, as well as with alternative development models, and to communicate perspectives to a wider audience. These organizations need to increase their knowledge of the public policy development process in order to be able to influence it and maximize gains to development, and join forces with other civil society organizations in order to strengthen their bargaining position.

The Transparencia evaluation study resulted in important lessons that could prove useful for similar efforts in the future:

► **Gender disparities run deep.** Development projects that aim to increase the number of female beneficiaries or provide more employment for women will not be effective without a systematic way to

measure gender differences in economic and social contexts. Simply underscoring women's empowerment and involvement—as in World Bank documents and project goals—is insufficient to address prevailing gaps between men and women, for example in wages and education. Structural realities and disparities in access to and control over resources and decision-making power have to be a central part of planning and implementing development projects.

► **Information spurs action.** Grassroots groups and individuals often lack basic information about the policy process and the skills to use conceptual and analytical tools, but can be more effective once these are acquired. Seminars and workshops can provide a forum for discussion and the articulation of common interests and can facilitate collaboration among activists and policymakers. The networks that result are essential to sustaining efforts in the future.

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